# Managing Education and Research Partnerships: Tips from the trenches

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RPLC RURAL POLICY LEARNING COMMONS
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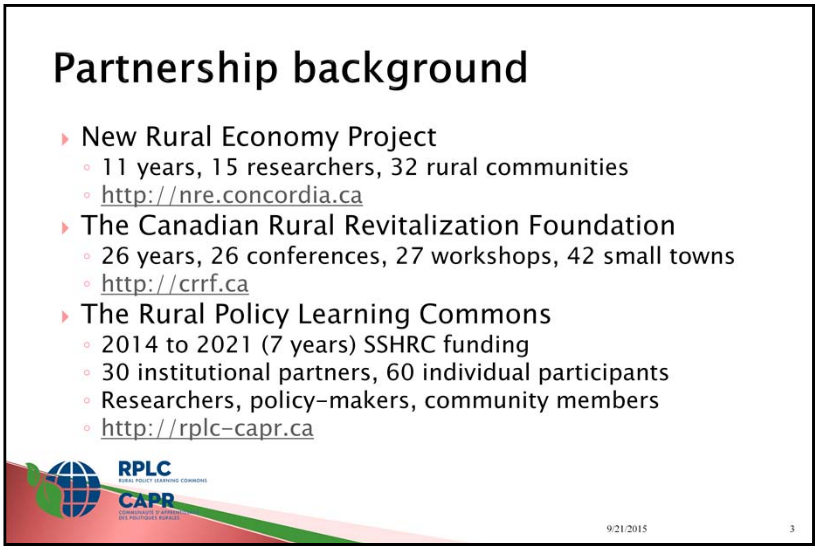
Social Sciences and Humanities Research Council of Canada Conseil de recherches en sciences humaines du Canada

- •ACSRC Network Leadership Symposium 2015 (September 22-24, 2015)
  - •Networks as Interventions: Policy Tools or Panacea?
  - •U of A, Lister Centre, Edmonton, AB
- •The symposium objectives are to:
  - •Explore how networks can function as interventions
  - •Identify the characteristics of highly functioning networks
  - •Share recent network development, research and practice innovations
  - •Assess the value-add of networks as a policy tool
  - •Share the lessons and realities of case studies from different sectors, venues and locations
- •On Phone: Focus on How to do it- with comments on how it can affect policy, with examples.


- Focus on 2 topics
  - Tips for managing partnerships
  - How do partnerships affect policy and practice?
  - Point to examples
  - These slides and comments are available to you via http://billreimer.ca/research.

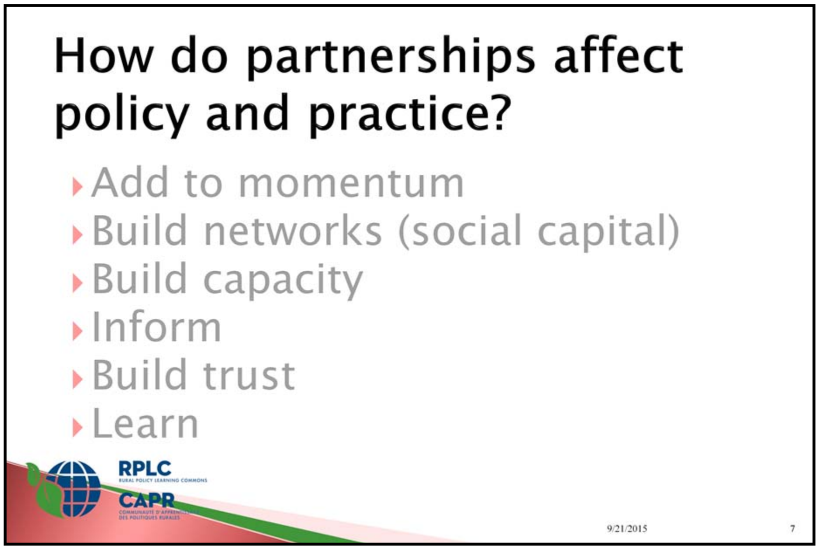



- New Rural Economy Project
  - 11 years, 15 researchers, 32 rural communities
  - ~ $5 million
  - http://nre.concordia.ca
- The Canadian Rural Revitalization Foundation
  - 26 years, 26 conferences, 27 workshops, 42 small towns
  - http://crrf.ca
- The Rural Policy Learning Commons
  - 2014 to 2021 (7 years) SSHRC funding
  - 30 institutional partners, 60 individual participants
  - Researchers, policy-makers, community members
  - Partnership project, not research
  - $2.5 million from SSHRC, ~$2.5 million from others (~$5 million)
  - http://rplc-capr.ca
- All projects with the common objective to improve the conditions for rural and northern people and places.


- I have a relatively lengthy list of things I have learned over my last 25 or so years.
- Don't have enough time to go through them all in detail, so I will briefly touch on them and invite you to follow up in the Q&A or take a look at the elaborations of them that I have posted on my website.
  - Consider this a 10 minute trailer to the full feature.
- (*)Organize the project as you would a voluntary organization.
  - *[This emerges from the **Things I would not do again** category: I would not organize as a business or government (market or bureaucratic: Reimer, Bill, Lyons, Tara, Ferguson, Nelson, and Polanco, Geraldina, (2008) "Social capital as social relations: the contribution of normative structures" Sociological Review, 56:2, pp 256-274.)*
  - *Instead: Treat the project as a voluntary organization (associative and occasionally communal)]*
  - We all have our day jobs – and although research collaboration is often an important aspect of them, there are many competing demands and opportunities we can use to fulfill this mandate.
  - Needs co-optation and seduction as a motivator, not coercion or exploitation (money helps)
- (*) Create a buddy system
  - There are many other demands on our lives.
  - Plan for this by establishing a lead person and an backup person for each task.
  - Backup is to keep up-to-day with the lead so they can step in when the lead person faces a deadline, a sick child, or an opportunity for a Mexican vacation.
  - I was pleasantly surprised by the other benefits that emerged from this approach
    - The demands on my time dropped (since the Lead and Backup worked out the minor issues themselves rather than come to me)
    - Innovative actions and solutions emerged – things I would not have thought of myself – because of the collaboration.
- (*)Bear the partnership burden
  - We're all busy; Use any partnership funds available to support the mundane requirements of collaboration.
  - Especially important for tracking accomplishments (e.g. CVs)


- (*)The Liaison Officer
  - One of the best actions I fell into: hire one or two Liaison Officers
  - They become the primary intelligence-gathering agents of the partnership.
  - Regular contacts with each partner (by phone)
  - Four questions:
    - What have you done?
    - What are you doing?
    - What are you planning to do?
    - What is most exciting?
    - What is the most challenging?
    - How can we help?
  - Pass it on to key staff, look for opportunities, plan for potential crises.
- (*)Balance inclusion and exclusion
  - Embed the project in an inclusive organization or network as a pool for mutual assessment of new participants.
    - In my case we had CRRF to serve this purpose.
      - Potential partners could be invited to CRRF conferences and we could do the dance that lets us decide whether we wish to continue.
- (*)Recognize institutional demands
  - We all live within context that create barriers to the accomplishment of our goals.
    - Researchers: careers and teaching demands
    - Policy-makers: Supervisors, accountability, fairness, the occasional election
    - Community partners: Family, talents and skills, social capital availability, safety
  - These barriers can often be overcome if we build them into our planning.
  - See my elaboration of this point via my website (http://billreimer.ca/workshop/research/files/ReimerCRRFPrinceGeorgeKeynoteSep2014V09.pdf)


- (*)Explore the use of multiple communication venues
  - Internet activities like e-mail, web meetings, websites, and social media need supplementation with face-to-face, telephone, forums to build trust and facilitate communication.
  - Connect frequently, with short meetings – to free time at the face-to-face encounters for big thinking and critical decisions.
- (*)Keep dual financial records.
  - Lag times on our institutional financial accounts typically are too large and make it difficult to manage the complexities of partner commitments
    - Especially in-kind contributions.
- (*)Recognize accomplishments
  - People need acknowledgement for their efforts and achievements.
  - Include traditional product counts, but also anecdotes
  - We kept an impacts file to record short, medium, and long term impacts.
  - Celebrate collectively.

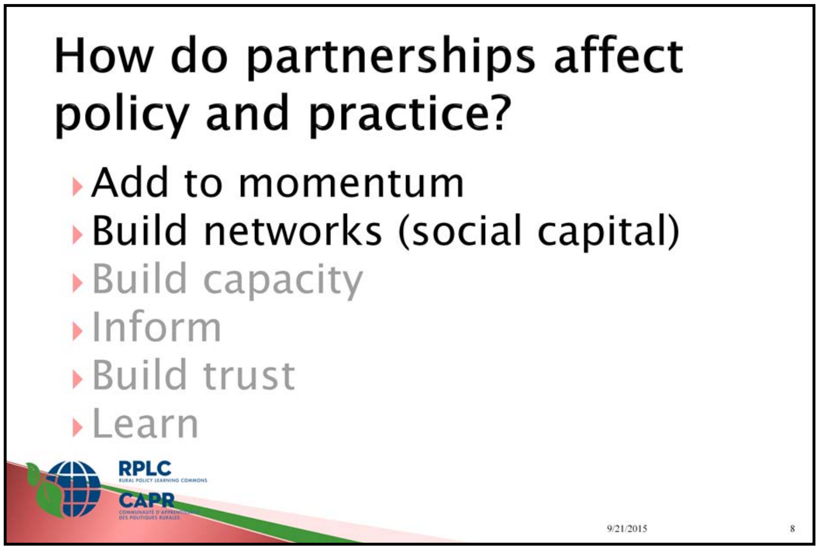



- How do partnerships affect policy and practice
  - This is a tricky question (if not a trick question) especially when it is asked of a partnership practitioner like me rather than a partnership researcher.
  - I will provide answers to it, but only with the recognition that they may be part of the noble lie:
    - Honorable beliefs that I maintain – in spite of little evidence to support them
    - Honourable because they serve to motivate me to continue to work under the assumption that my efforts affect policy and practice – and do so in a manner that improves it.
  - Here is my current list of processes and examples
- Partnerships add to the momentum for particular policies and practices.
  - It is rare when only one act is responsible for an important change.
  - Most often it is the accumulation of many efforts and related events
  - For example, in 1994 and 1996 CRRF appeared as a witness before federal parliament and senate committees regarding rural issues.
  - It was in the latter presentation that we proposed the establishment of a position at the Cabinet with the responsibility to examine existing and emerging policies and proposals through a “Rural Lens”.
  - The reports from those committees led to the establishment of the Rural Secretariat in 1998.
  - Ours was most likely only a minor contribution to the decision, but it provides a way for advocates to increase the credibility of their position by referring to ours.
- Build networks (social capital)
  - Partnerships also serve to build networks that can be used by policy-maker
  - My example here is the Senate report on rural poverty (Fairbairn, 2006, 2008).
    - When the Senate committee was looking for people and places to connect with for their report, they sent their policy researchers to our doorstep. We provided them with people, places, and advice about why they might be important and how to contact them.
    - Later, when their 2 reports emerged the list of witnesses, consultants, and site visits was filled with the names and places we had suggested.
    - It’s impossible to know what it might have looked like if we had not been contacted, but the knowledge and networks we had built over the years basically ensured that our voices would be on the list.
    - Another example of this process can be found in the experience of Solidarité rurale and the development of the rural policy programs in Québec.

*•[I like to believe that CRRF’s promotion and our appearance as witnesses before the Joint Commons and Senate Standing Committee on Agriculture, Agri-Food and Forestry in 1994 and the House of Commons Standing Committee on Natural Resources in 1996 were important contributions to the establishment of the Rural Secretariat in 1998.*

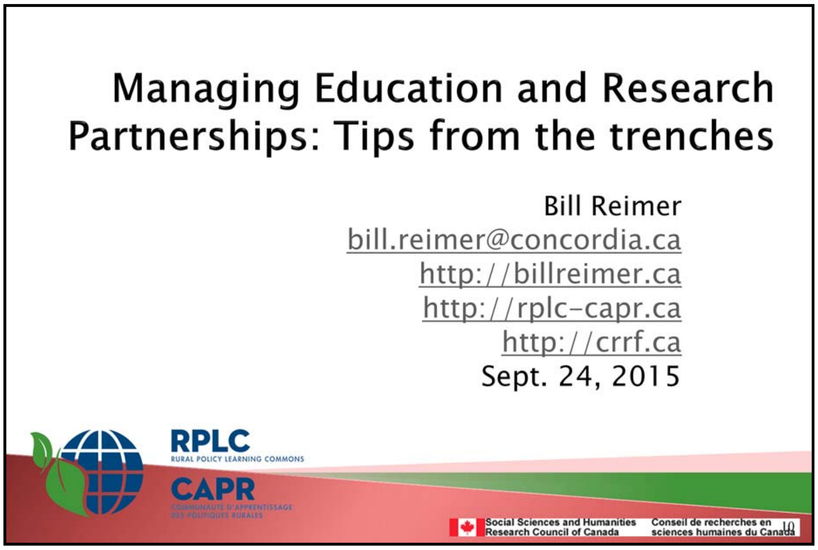
*•Apedaile, L. Peter, Reimer, Bill, Frances Shaver, Jack Stabler. 1994. Agriculture Group, and Rural Restructuring. Towards a Whole Rural Policy for Canada. Brandon: The Rural Development Institute.*

*•Apedaile, L P, and Bill Reimer. 1996. Towards a Whole Rural Policy for Canada. Edited by The Agriculture Group and Rural Restructuring. Ottawa: The Canadian Rural Restructuring Foundation.]*




- Build capacity (share skills and capacities)
  - This process can occur in two significant ways: for those within the partnership and for others
  - Within the partnership
    - This is what it can be all about.
    - In the RPLC, for example, a basic principle of our network is to avoid duplicating work that is already being done. Instead, use our resources to find out who is already the expert then support them in ways that will benefit both their agendas and ours.
    - In this way, we are supporting the strength of the established publishing capacity at RDI, the collaboration software of Yaffle, and the Distance Learning experience at Oregon State.
  - With respect to building others' capacity, we have many examples of the way in which CRRF has had significant impacts on the policies and programs of the communities in which we have met.
    - We decided early on to meet in rural places wherever possible.
    - This means partnering with people in those places, bringing them on as key planners and actors.
    - This means that we learn and they learn
      - E.g. Tweed: When the town of Tweed agreed to host our 2004 National Conference they soon realized they were not going to be able to do it on their own. In desperation, they asked for the help of neighbouring communities – some which had been regional rivals for many years. The collaboration was such a success that after the conference, they marketed the region as "Comfort Country" thereby increasing the critical mass to a point where they could collectively be seen a tourist destination.
      - This pattern has been replicated in many of the places we held our conferences: Coaticook, Nelson, and Twillingate, for example.
- Partnerships are an excellent way to inform and mobilize knowledge (others as well as partners)
  - It is a well known principle of knowledge sharing that early and regular engagement of individuals and groups is the best way to ensure the passing of relevant and useful knowledge. People pay attention to those things in which they are directly involved and where their contributions are respected.
    - The Leslie Harris Centre is an institutional example of this feature of partnerships – one where the rural communities and provincial government is engaged in most programs of the Centre.
    - The town of Seguin, ON (one of the partner communities in the NRE Rural Observatory) learned this when they overcame the resistance to tax increases by the seasonal residents. They put those residents on their municipal committees – and the resistance to tax increases disappeared as the seasonal residents learned of the challenges faced by the town and the way that their taxes ensured that the roads were cleared in winter, the garbage was properly treated, and their properties were protected.
    - The town also discovered that these seasonal residents became valuable assets since they were well connected with the provincial policy circles and could leverage additional funds for local projects.


- Partnerships also affect policy and practice by building trust.
  - Working together provides opportunities to understand the other people around the table, know where their strengths lie, and where their limits are. These are essential ingredients to building trust – and knowing the limits of that trust.
    - Cap-St-Ignace knew how to do this very effectively.
    - About 3 weeks after my family moved to the village on my sabbatical, we were visited by a local couple who introduced themselves as our community-appointed godparents. We spent a lovely hour with them discussing who we were, what the town was like, and what opportunities there were. When they left, our newly appointed godparents invited us to the community supper that was held each month.
    - On the evening of the dinner, they picked us up and took us to the municipal hall, introduced us to the others at our table, and ensured we were comfortably settled.
    - Part-way through the evening, the music stopped, the mayor came to the microphone, and invited us to the front with our godparents.
    - Our godparents introduced us to the village people and passed on many of the things they had learned about us to the people at the dinner. We were presented by the mayor with a certificate of welcome to the community.
    - It was only later that I realized how clever this procedure was for the process of trust-building in the community. By proactively engaging newcomers like us in this way, not only did we willingly inform the community about ourselves, but our confidence and trust of the local people was dramatically increased. It made our many subsequent encounters with the community both easier and more enjoyable, just as it must have lowered the collective anxiety and concerns of the local townspeople.
- As illustrated by this story, partnerships are also excellent ways to learn
  - This is especially important when we consider policies and practice since they both require us to get it right.
  - Since partnerships imply regular and long-term relationships this means that there are plenty of occasions to revise and get the policies and practice right – or closer to “right” than one-time engagements allow.
  - It also means that more time is available for making the previous advantages possible: building trust, transferring knowledge, learning skills, building networks, and increasing momentum.
  - It’s what has got us in CRRF to the position we are currently at and it is what we count on in the RPLC to confidently claim that the primary outcomes of our partnership will be better rural and northern policy and practice.




•Comments for Leadership Summit

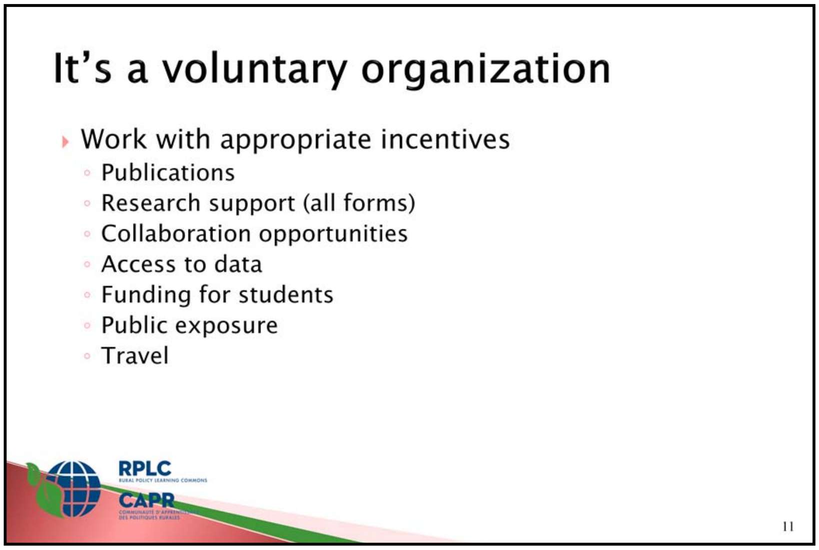
•Tell us one thing that you know about how interorganizational networks are useful (or not) as policy tools.

•Organizations excel at coordinating the attention and energy of many people to get things done. The objectives may vary, from accumulating profit, beautifying a park, recovering from a tsunami, or even getting to the moon. They are the manifestations of policy. However, their ability to focus resources on specific goals can be disastrous in a world where complexity reigns.

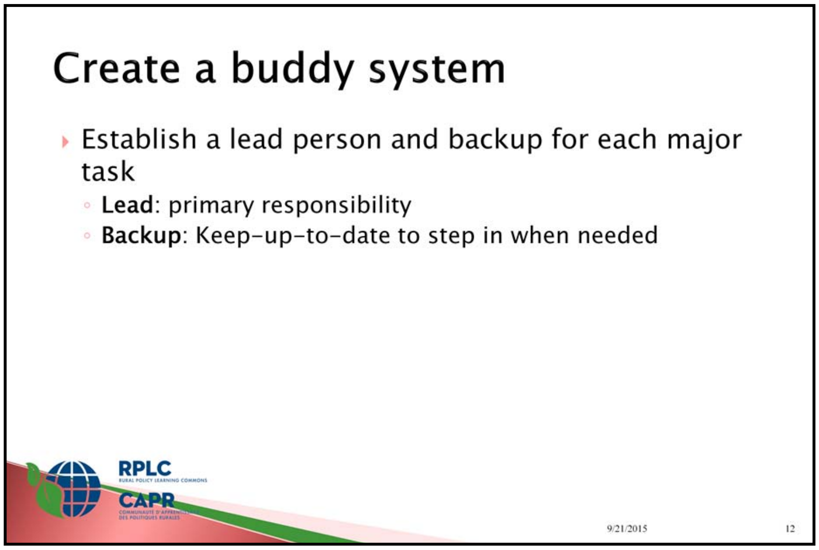
•Partnerships with other organizations force each of them to confront the limitations of their policies and practices. They do this where one partner fills a gap in the other's goals, where negotiations reveal the limits of each partner's competencies, and when partnerships lead to tension and even failure. In the language of social capital – organizations excel in bonding, cohesion, and exclusion but partnerships provide the bridging and linking relationships that foster innovation, accommodation, inclusion, and resiliency.

•References

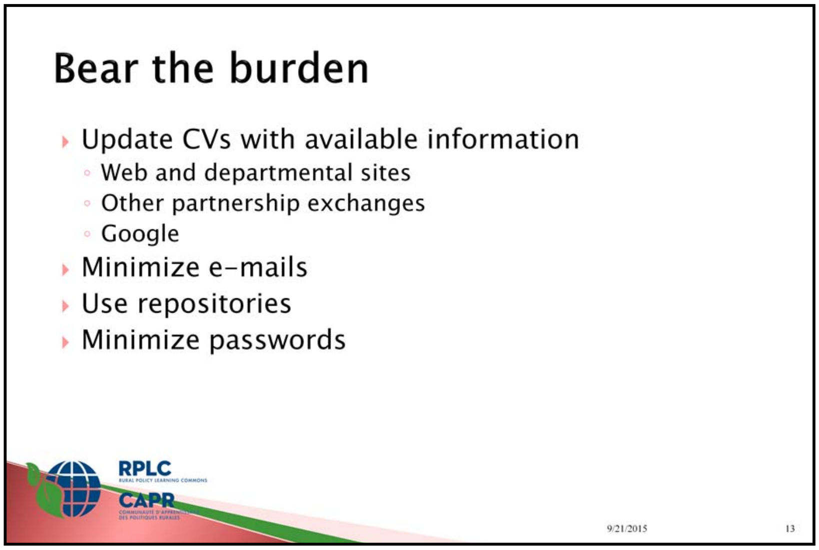
•Reimer, Bill, Lyons, Tara, Ferguson, Nelson, and Polanco, Geraldina, (2008) "Social capital as social relations: the contribution of normative structures" *Sociological Review*, 56:2, pp 256-274.



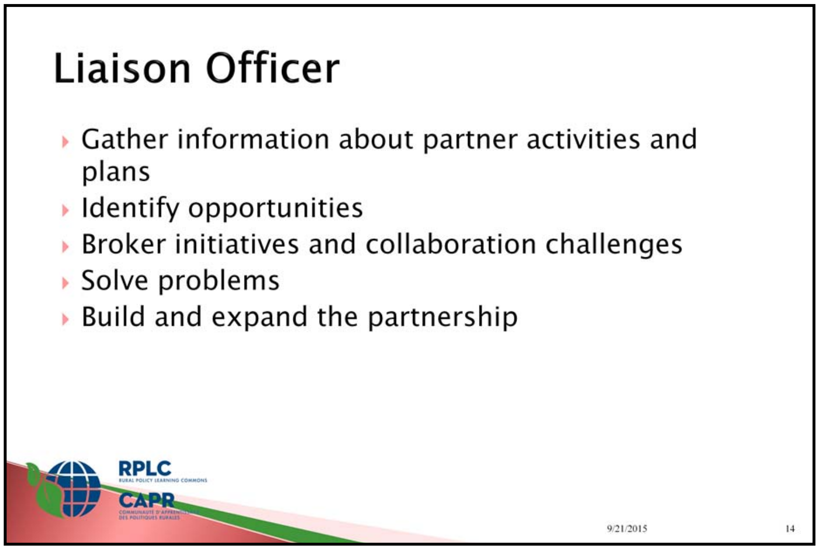

- Treat the project like a volunteer organization, not a business or bureaucracy
- We all have our day jobs – and although research collaboration is an important aspect of this, there are many competing demands and opportunities to fulfill this mandate.
- The researchers among us are highly trained professionals (with big egos) – so the usual incentives found in a business or bureaucracy don't work.
  - Not a criticism of big egos!
- Implications for governance
  - Work with incentives that are appropriate: publications, research support (financial and otherwise), collaboration opportunities, access to data, funding for students, opportunities for presentations and media exposure (for some), travel.
  - Respect and find ways of integrating divergent opinions



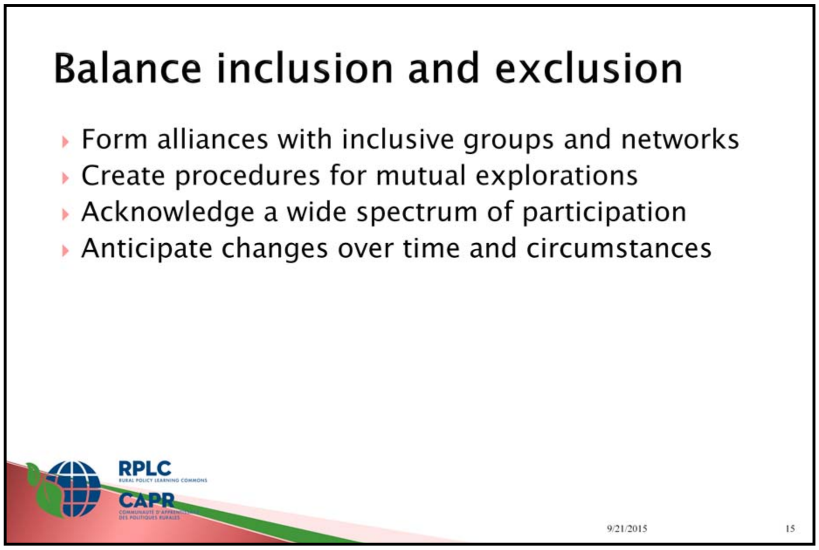

- •Use a buddy system
- •Life happens.
  - •There are many other demands on our time: medical issues, family demands, vacations, and recuperation time.
- •Recognizing this and planning for it can go a long way to maintaining the operation of the project.
  - •I establish a lead and backup for each task/sub-project.
    - •Lead is the person who is primarily responsible for the task.
    - •Backup is responsible to keep abreast of the activity, support the lead, and be able to take over where the lead is unable to do so.
  - •Each lead can also be a backup for someone else.
    - •This also facilitates network communication since people become aware of details within the other tasks.
  - •This approach also works extremely well for student assistants (they have their own set of diversions).
    - •I will usually hire two students rather than one if I have the chance – even if I have to split the funding to do so.
    - •It has the additional advantage of significantly reducing the demands on my time, since the students would generally work out the minor challenges on their own rather than bring them all to me.



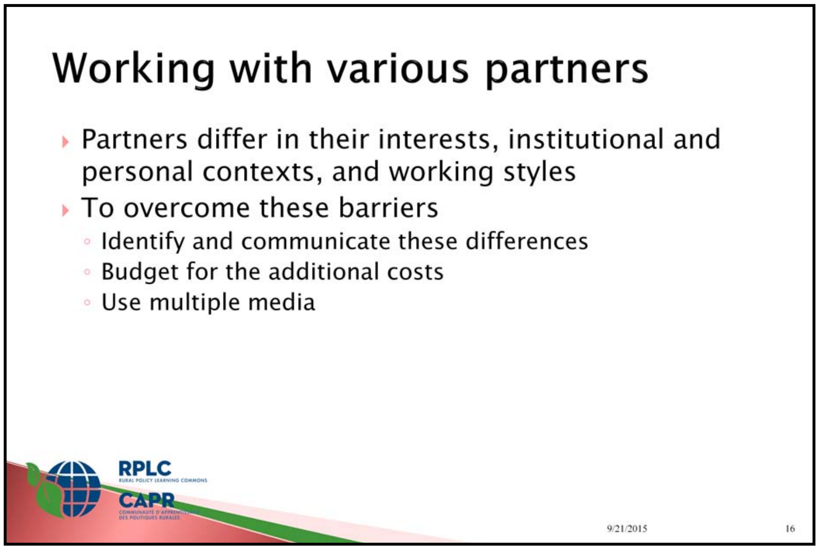

- Use the partnership funding to bear the burden of the collaboration.
- You will be working with people who already have busy agendas.
  - The most competent and interesting ones are usually overburdened.
- Use resources of the partnership to bear the burden of the many small things that are usually downloaded to the partners.
  - Don’t ask them for CV updates and recent activities unless absolutely necessary
    - Hire a student to do the research
      - Use the internet – it’s a research skill – check their university sites, media events, google
      - Prepare the document as best you can
      - THEN go to the partner with a formatted document and ask for changes and missing pieces
    - Integrate it with other activities
      - E.g. Steering committee minutes (include reports)
      - Task force minutes
      - Cf. next tip: Liaison Officer
  - Minimize e-mails.
  - Make use of posts, forums, common repositories like dropbox or sync to share material.
    - These allow partners discretion over when to access the materials – and provide an archiving system at the same time.
  - Minimize passwords




- One of the most valuable discoveries I made is the hiring of a Liaison Officer
- Role:
  - Gather information about partner activities, plans, and challenges (Intelligence gathering agent).
  - Identify new initiatives and serendipitous opportunities.
  - Broker plans and collaboration challenges.
  - Anticipate and solve problems.
  - Build and expand the partnership with new partners.
- Periodically, the Liaison Officer will phone each of the partners to chat about 4 things:
  - What have they been doing since the last chat?
  - What are the challenges and accomplishments they have faced?
  - What will they be doing for the next month or so?
  - How can the partnership help them?
- The chat is informal and includes more than just the information directly relevant to the partnership, for example, it includes discussions about:
  - Travel plans,
  - Exciting events in their lives (including family),
  - Crises and upcoming plans.
- Allows us to:
  - Anticipate downtimes (and discuss alternative support arrangements)
  - Identify opportunities – both for the person on the phone and for others
  - Address conflicts
  - Gather information for the partnership
    - New accomplishments
    - For CVs (see previous tip)
    - Working styles of the participant (each person is different so it is important to identify their styles and work with those styles)
  - Pass on information regarding other opportunities that may be available in the partnership
  - Improve the social cohesion of the partnership.
- Other tasks:
  - Pass on this information to other administrators,
  - Maintain log and databases on accomplishments, contacts, impacts of the partnership,
  - Support communication events: Conference calls, workshops, conferences, exchanges, social media, etc.
- In our case we have multiple Liaison Officers.
  - We cross many time zones and multiple sub-networks (Canada, USA, Europe, Other).
  - The Liaison Officers will share databases and communication.
  - We also use students in this role.
    - Provides unequalled opportunity for their careers – networking and learning about the multiple contexts of research
- The Liaison Officer activities require written, shared databases, however – to ensure institutional continuity
  - Shared databases also facilitate communication.




- Growing the partnership requires an initial dance period.
  - To mutually explore the overlap of common interests and professional and personal compatibility.
  - We can't always get along.
- This requires methods for identifying potential partners, testing compatibility in a congenial and mutually rewarding context, and recognizing statuses on the road to full partnership inclusion.
  - It also requires face-saving methods of exclusion along the way.
- This is especially problematic in the research context since the quality of the research is an important criteria for funding and credibility. To meet these quality requirements the "rules" tend to be rather strict.
- At the same time, I am convinced that engaging researchers with those outside the academic context improves the research quality and utility – especially where social and political phenomenon are the objects of study.
- We were fortunate in the New Rural Economy project (http://nre.concordia.ca) since it was a project that emerged from a very inclusive organization (the Canadian Rural Revitalization Foundation – CRRF).
  - CRRF had a program of annual conferences, workshops, and communication that included a wide variety of participants: researchers, policy-makers, practitioners, and community people.
  - It was in CRRF that the dance could take place.
  - It provided a context for formal presentations and informal exchanges – in rural places, on field trips, over lunch, and in committees.
  - This allowed us to invite or discover potential partners from a large and inclusive pool of interested people, then provided opportunities for us to hear from each other in a safe environment.
  - The result was a list of a wide variety of involvement levels: full partners recognized by SSHRC, people who participated as critics and supporters to those who were interested but uninvolved other than as spectators.
- This meant that we could select the more exclusive group from among the more inclusive pool of CRRF.
- It also meant that these roles could change as peoples' interests and the demands on their time changed.
- This can be organized in other circumstances by forming alliances with inclusive and broadly-focused networks.




- The interests, institutional and personal conditions, and working style of different types of partners are quite different.
- This can create barriers to collaboration that need special attention.
- I have produced a presentation on this issue which focuses on three types of partners:
  - Researchers
  - Policy-makers
  - Community partners
  - (Reimer, Bill (2014) "Facilitating Collaboration for New Rural Realities" Keynote presentation at the CRRF Annual Meeting: New Realities, New Relationships, Prince George, BC, September 26.
  - http://billreimer.ca/workshop/research/files/ReimerCRRFPrinceGeorgeKeynoteSep2014V09.pdf)
- In that presentation I mention a number of ways to manage the barriers created.
  - Identify and discuss these differences and their implications for the project.
  - Anticipate the additional challenges and time that these differences create. Budget for them.
  - Identify and articulate an appropriate division of expectations and labour.
  - Use multiple media:
    - Update letters, newspaper articles, radio interviews, posters, copies of research products, websites, community forums, council presentations.

## Explore multiple communication options

- Meet face-to-face wherever possible
- Prepare for face-to-face meetings
- Have frequent internet meetings (especially before face-to-face ones)
- Explore all types of communication to find the best combination for your competencies

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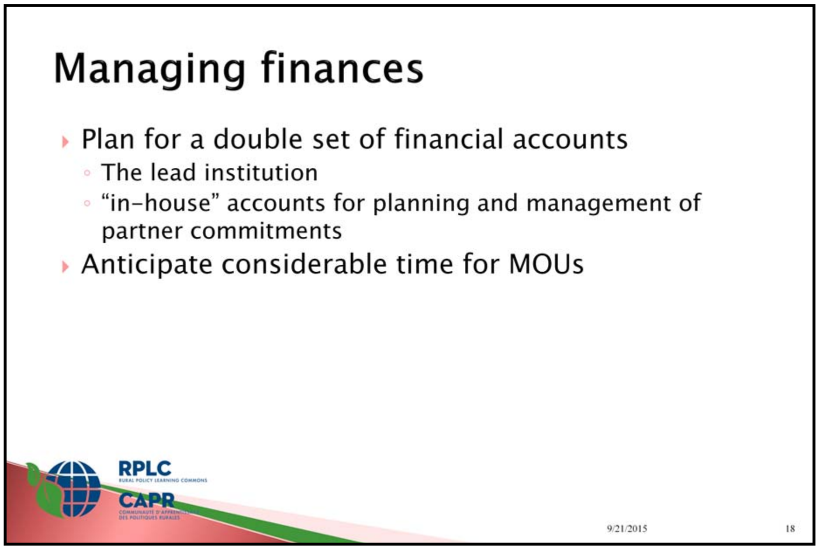
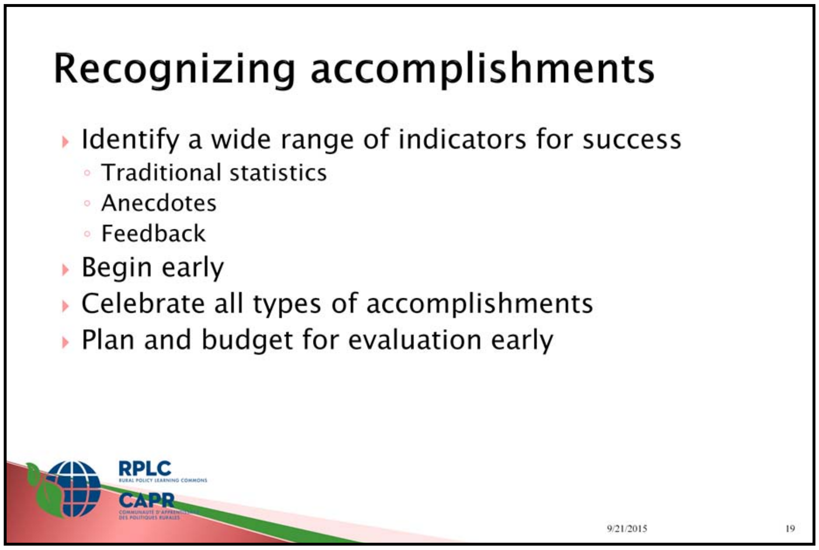
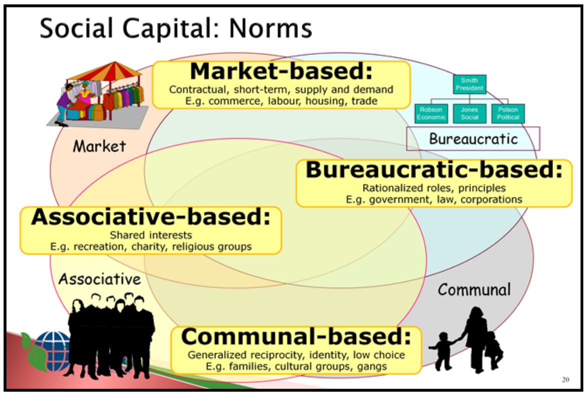
- In large project, communication is critical
  - It is therefore necessary to explore and develop collective facility with multiple forms of communication.
- Internet-based tools are useful, but not sufficient
  - Need periodical **face-to-face** communication to establish and build trust and commitment.
    - Especially important for key and controversial decisions.
  - **Telephone** has the advantage of immediate feedback on an issue – and carries more information about tone and intensity.
  - **Forums** handle the time zone problem and allow the participant to decide the time of participation – but they require a level of commitment that is high since people must commit to going there frequently (or they must be seduced to do so).
  - **Web meetings** have the advantage of sharing and viewing, but the technology is fragile.
    - Especially in our case where broadband is limited in some locations.
    - We have to pair it with telephone (possible with Adobe Connect, for example)
  - **E-mails** good for specific items only
  - **Websites** useful for as notices and data depository
  - **Social media** for notices
- Tips from our experience
  - Meet face-to-face wherever possible
    - Since we are busy, we do it at conferences where groups of us are already attending.
  - Prepare for the face-to-face meetings well in advance since the time will be tight.
  - Have frequent internet meetings.
    - We schedule two a month using Adobe Connect
      - One for the Steering Committee
      - One as an “Open Office” event – for anyone to join
    - Deal with the minor details and sharing of information
    - Schedule extra ones before a face-to-face meeting to:
      - Get the minor issues dealt with
      - Identify the important questions to be dealt with at the face-to-face meeting
    - Record and make information and decisions from these meetings generally available
  - Include Liaison Officers – they are often having to repeat information




- It is typically necessary to maintain two sets of financial accounts.
  - One prepared by your lead institutional office.
  - One prepared and utilized for planning and immediate accounting purposes
- Most institutions have a delay in entering items and have no facility for anticipating expenses.
- Partnerships include multiple institutional conditions and demands for preparing, planning, and processing funds
  - This is especially complicated with the management of in-kind and cash commitments.
- Plan for a commitment of time and attention to managing all these elements – on an ongoing basis and for accountability.
- MOUs time consuming (especially where non-Canadian institutions are involved)
  - Typically involve a variety of conditions that reflect institutional procedures and local culture.




- Need wide variety of indicators for success (and failure)
  - Traditional research outputs
  - Policy impacts
    - Anecdotes as well as statistics
    - Feedback as reflected in e-mails, comments, and requests
  - Community impacts
    - Anecdotes as well as statistics
    - Feedback as reflected in e-mails, comments, and requests
- Begin early
- Be inclusive by celebrating all types of accomplishments
- Plan and budget for evaluation early




- Social capital is conditioned by both the structures of networks and by the norms that operate within those networks.
- People frame their activities, organize their behaviour, and take collective action in many ways.
- Collective behaviour requires the sharing of particular norms and expectations that must be met in order for trust to develop and action to occur.
- Norms are the expectations, institutions, rights, obligations that guide our social relations

  •The rules (formal and informal, explicit and implicit) that govern to some extent the way we conduct ourselves in those relationships and what we expect of others

  •Social relations are characterized by incredible variation and innovation in the systems by which we relate, but

•We have found it useful in our research to think about the normative structures of social relations in terms of four broad types

  •(*) Market relations (e.g. commerce, labour markets, housing markets, trade)

    •Based on supply & demand, contracts

    •Supported and controlled by trade agreements, competition legislation, labour law, better business bureau, and the courts

    •They are the norms that guide us when we shop for groceries, seek employment, or negotiate the purchase of a house

  •(*) Bureaucratic relations (e.g. government, corporations, law, formal organizations such as most of those related to health)

    •Based on rationalized roles, authority and status, generalized principles

    •Reinforced by legislation, corporate law

    •They are the norms that guide us when getting our driver's license, meeting a doctor, or for most of us, relating to colleagues or students since as government employees we operate largely in bureaucratic types of relations

  •(*) Associative relations (e.g. baseball leagues, bridge clubs, environmental groups, meals on wheels)

    •Based on shared interest

    •Controlled by civil law, municipal by-laws, social norms, and informal sanctions

  •(*) Communal relations (e.g. families, friendship networks, gangs, cultural groups)

    •Based on kinship, generalized reciprocity, favours

    •Strongly implicated with identity development and change

    •Controlled by informal norms, legislation, family law, and government support agencies

•All types of normative structures are implicated in most relationships, but some more predominant than others in specific cases or for particular types of organizations

•These systems are not always compatible, but they can be organized in such a way that they can reinforce one another for particular purposes and at particular times

•Hypothesis: High capacity communities are those that show the ability to function and integrate all four types.
  - Often not visible to our analysis and policy considerations since we do not have the indicators which are sensitive to them.
- The lessons here are
  - Cast our net sufficiently wide to recognize those outside the formal spheres of business and government, and
  - Extend our repetoire of indicators to reflect these other types of social relations.
  - When we broaden the framework in this way, we see how rural communities have resources available that are not always recognized by our typical foci (i.e. market and bureaucratic-based networks and considerations).